Chapter 1

Introductory

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Chapter 1 - Introductory

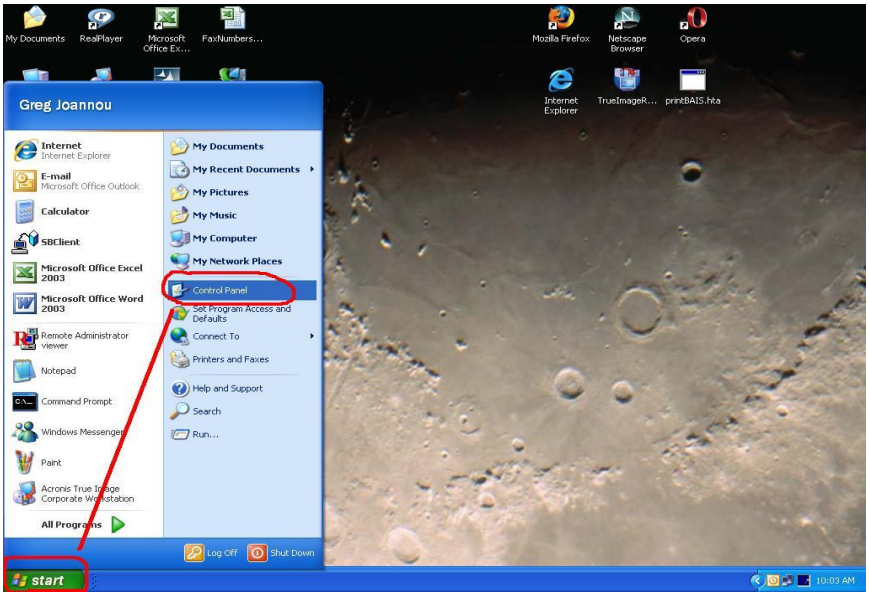
Before you Begin

To ensure all your browser settings are correct there are a few things you should check before you begin to use ibais.

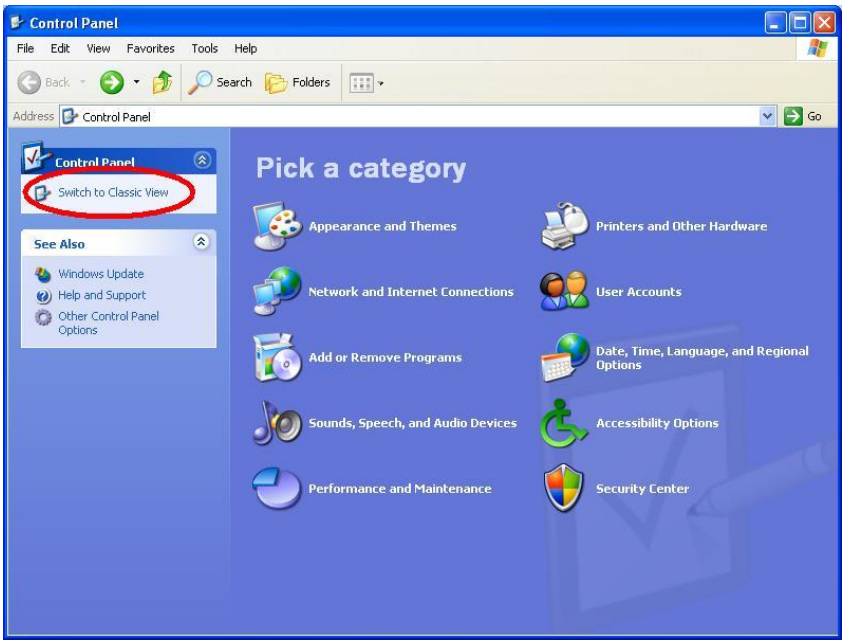
Changing Regional Settings

To ensure the dates are displayed in local date format it may be necessary to alter the Regional settings on your computer.

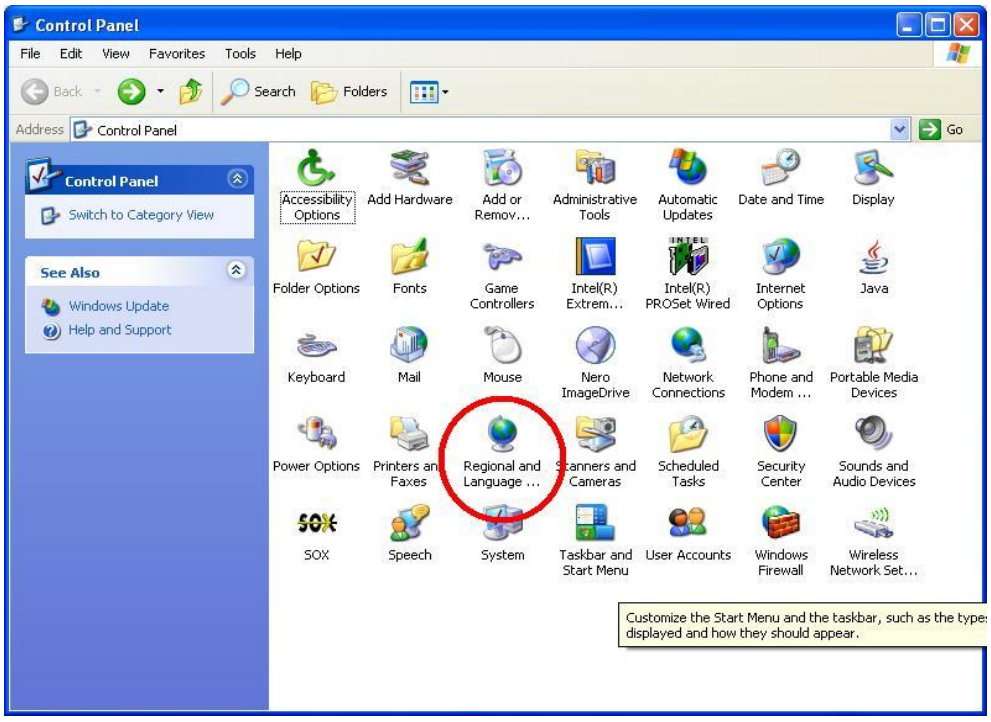
Go into **Control Panel**. This can be done by clicking on the "**Start**" button then Clicking on **Control Panel**. See image below.



If this is your 1st time in Control Panel, then it will most likely look like the following (Windows XP only). Click "**Switch to Classic View**" as it's easier to navigate.

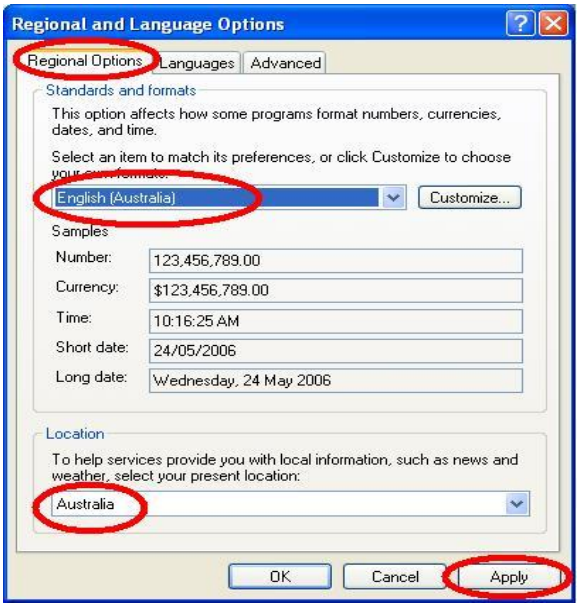


Once this is done, the Control Panel will look like the picture below (this is standard on all operating systems besides Windows XP). Here we click on "**Regional and Language Settings**".

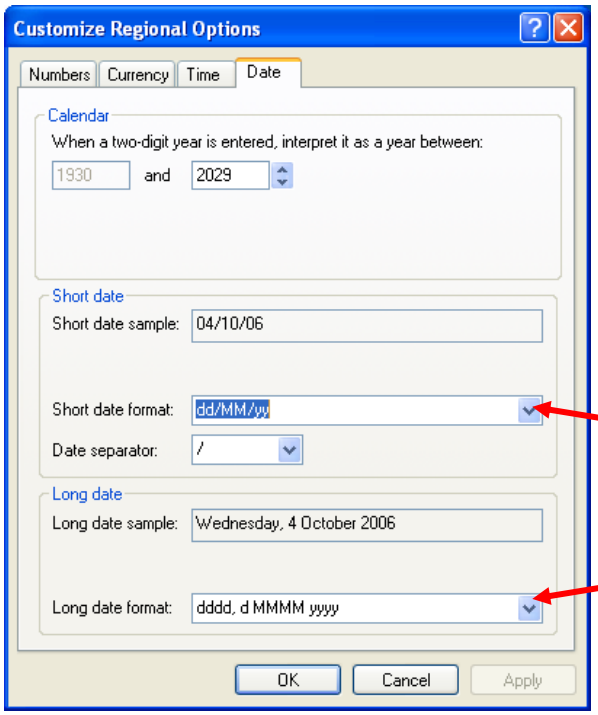


This will open up a new window. Here you select both the options under "**Regional Options**" and change them so the 1st one is set to "**English (Australia)**" and the 2nd one to "**your location**". Then click **Apply**, and your regional settings will be changed.

Note: overseas sites should set these options to match the local standards.



Click on the "**Customize**" button which will show the following window. Click on the **Date** tab to open this screen.



Where the "Short date format" and "Long date format" are, make sure they are in Australian format: "day/month/year" as shown here.

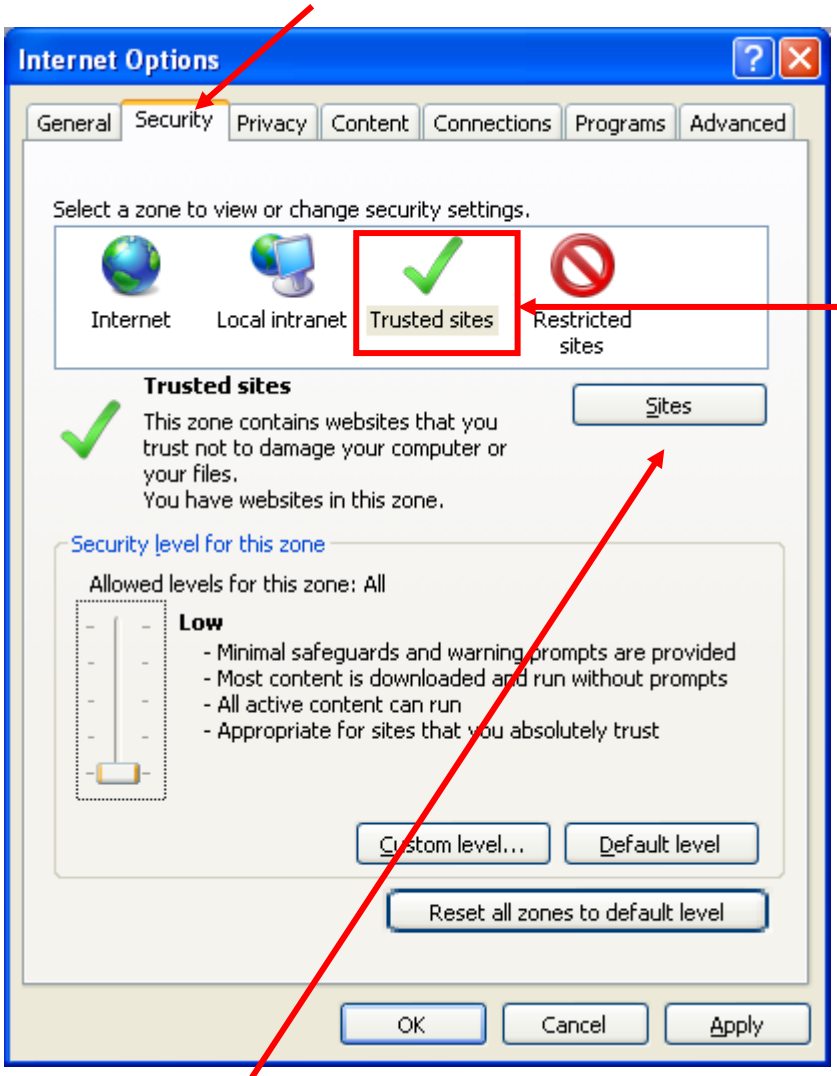
Click on **Apply** and then click **OK** to close all the windows.

Adding the ibais Site to "Trusted Sites"

The ibais site https://designbais.bais.com.au/ibais (**for Bureau users**) or the IP address you use to access ibais (**for Standalone users**) needs to be added to the **Trusted Site** zone to function correctly. If it is not in this zone, security will stop certain functions from working correctly and, by default, pop up screens will be blocked.

The following explains the correct settings and how to add a site into the "**Trusted Sites**" in Internet Explorer 6 and 7.

Open Internet Explorer and click on "**Tools**". Select "**Internet Options**". This will display the window below. Click on the "**Security**" tab.



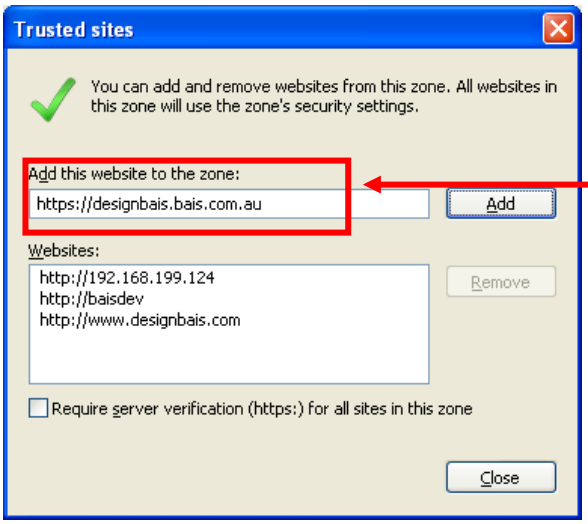
Click on the "Trusted sites" icon.

The "Security level for this zone" should be set to "Low".

In Internet Explorer 6 this is the default level, so if not set to low it can easily be changed by clicking on the "Default level" button.

In Internet Explorer 7 this is not the default level so it will need to be changed.

Now click on the "**Sites**" button above which will bring up the following window.



To add a new site simply type in the web address in the space provided next to the Add button. Once you have typed it and double checked the spelling click on Add.

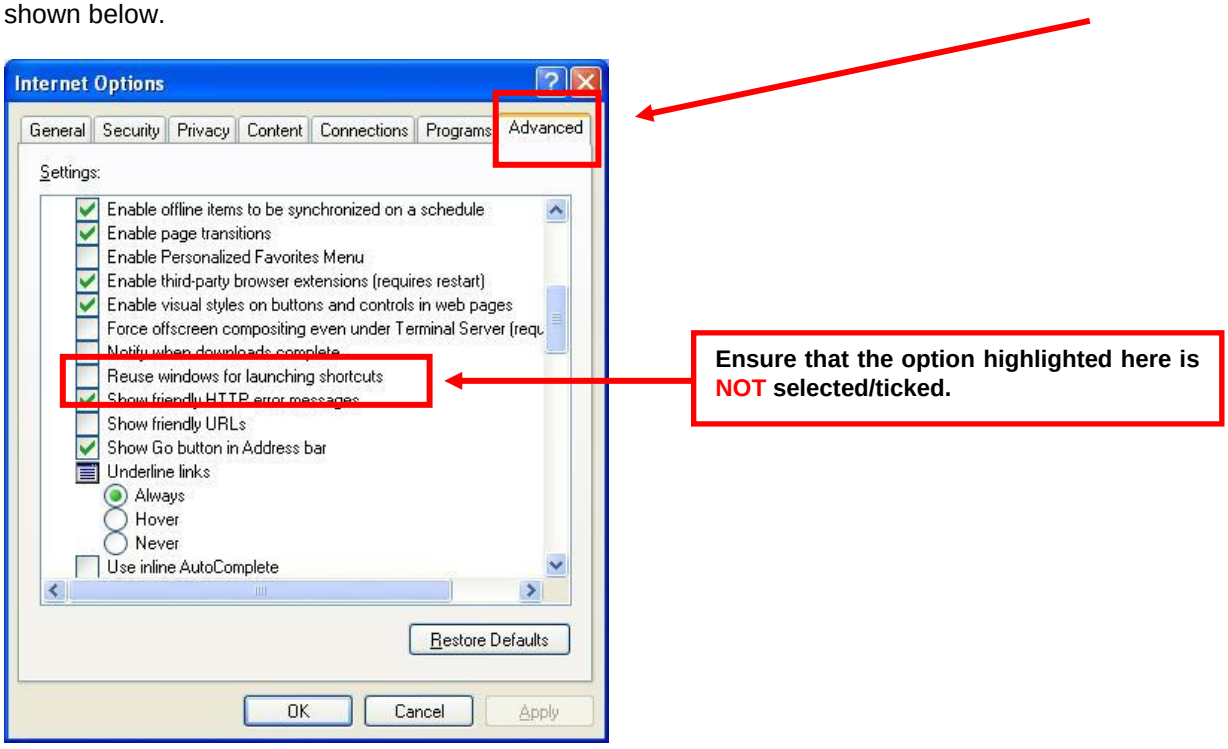
Remember:
if you are a Standalone user this will not be the address shown here – substitute the IP address you were given to access

ibais.

You may or may not already have sites listed. **Close** this window and apply the settings on the previous window.

Deselecting the Re-Use Windows Option

After setting Trusted Sites and returning to the Internet Options screen, click on the **Advanced** tab as shown below.

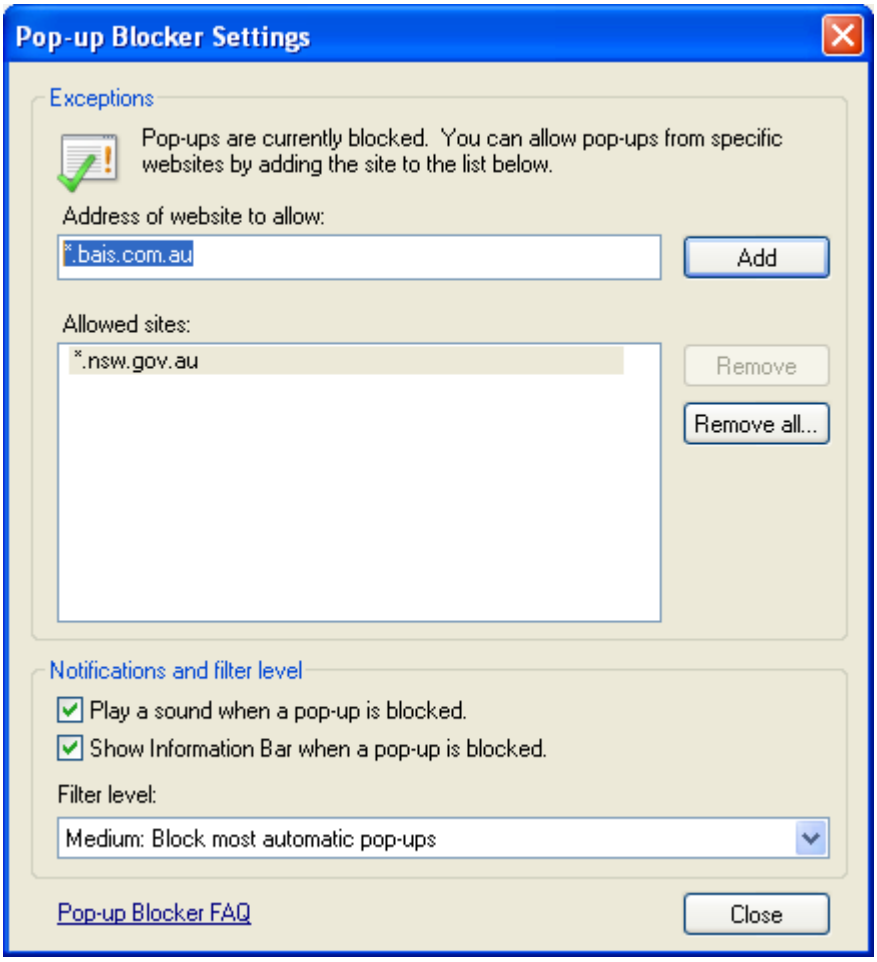


Ensure that the option highlighted here is NOT selected/ticked.

To ensure these changes take effect immediately, it is suggested that you close the current Browser and start a new one.

Allowing Sites for Pop Ups

Open Internet Explorer and go to the **Tools Menu**. Select **Pop Up Blocker** and **Pop Up Blocker Settings** from the menu.



As shown above in the "**Address of website to allow**", add the following:

For Bureau users: *.bais.com.au

For Standalone users: The IP address you were given for accessing ibais

Click **Add** and the entry should be moved into the **Allowed Sites** section.

Click **Close**. Close your browser screen completely and open a new one to allow these new settings to take effect.

Setting up Pages in ibais

To ensure correct report and document printing please make sure the following has been setup in your Internet Explorer Page Setup Settings.

1) In Internet Explorer go to **File** then select **Page Setup**

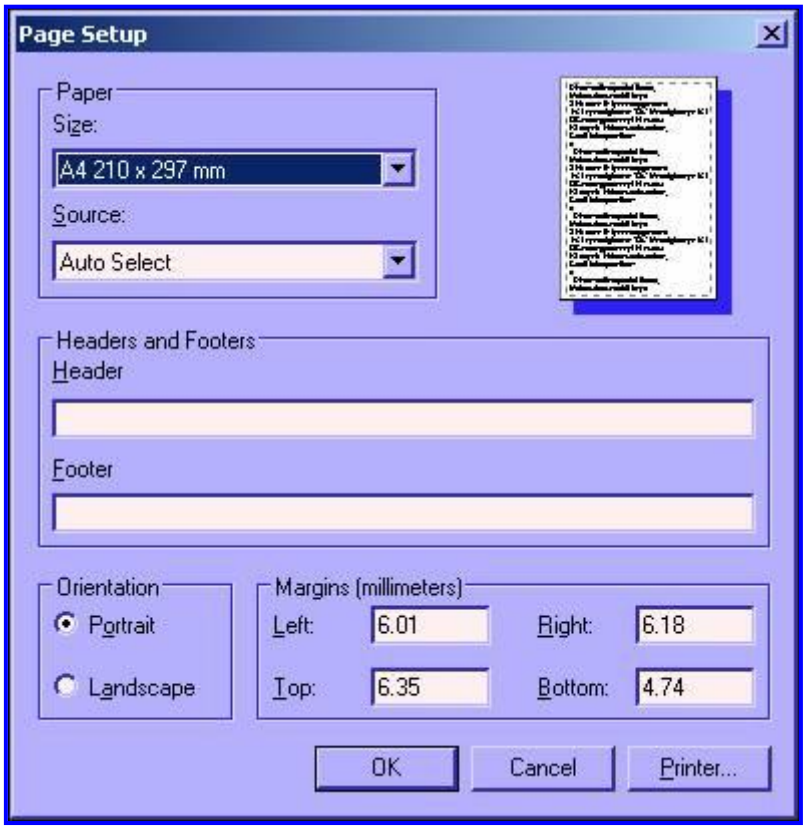
2) Choose paper size **A4**

3) **Delete anything in Header and Footer** if there is anything there

4) Set all margins to **0**

5) Click OK then go back in to page setup to **make sure the changes have been applied**. (The margins will not remain as zero but this will default to the minimum possible margins for the default printer selected.)

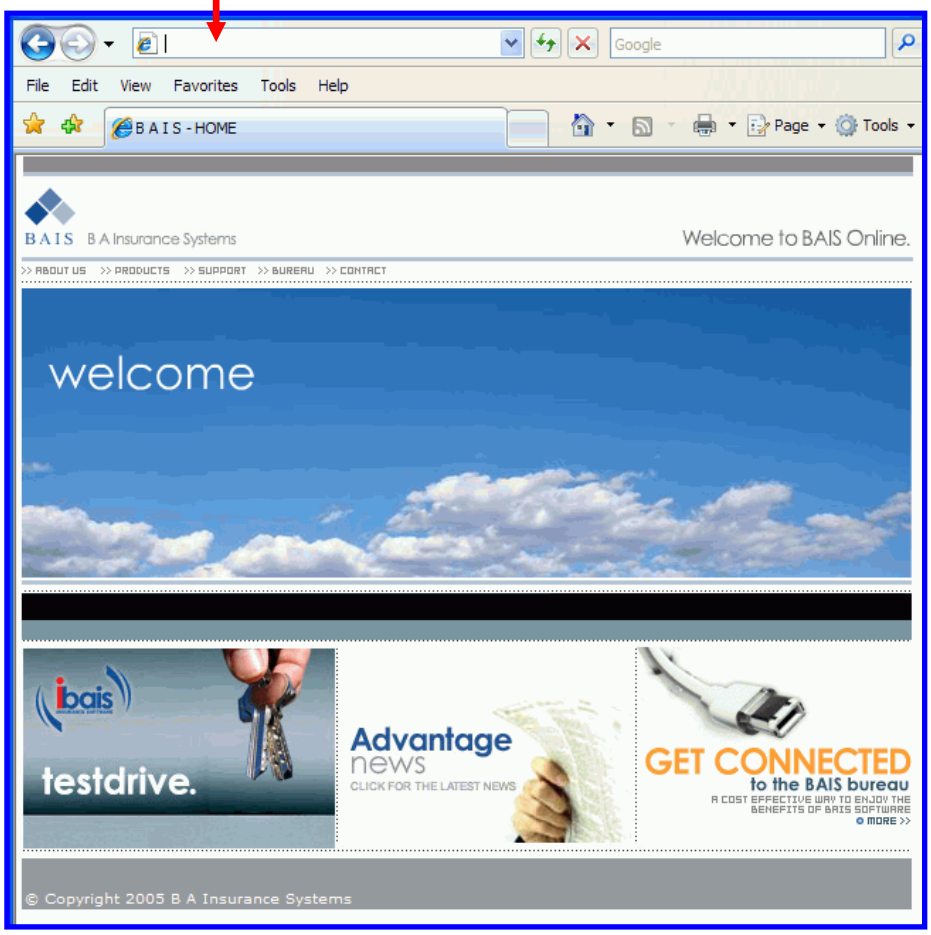
See screen shot below:



How to Access the ibais System

ibais is an internet based system and therefore access is via the Internet Explorer Browser.

Call up Internet Explorer (you will need Version 6 or later) and type in the internet address **https://designbais.bais.com.au/ibais**, if you are a **Bureau user**, or the IP address provided to you if you are a **Standalone site**.



Save the address as a **Favourite** and it will always be easily available.

ibais does not have a continuous connection to your server and we advise you to open a session in the morning and leave it minimised – then when you need it you can simply maximise the browser and start entering details.

Logging In

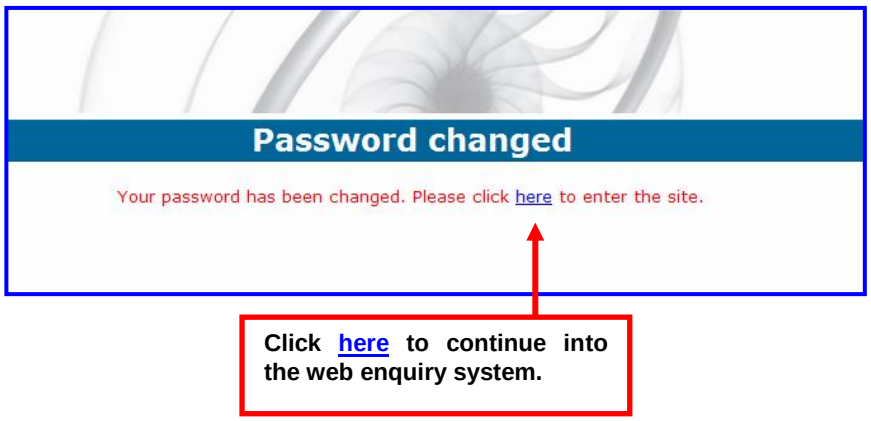
When you browse to the ibais home page, you will be required to enter your **User name** and **Password**.

Enter the UserID and password you were provided with. Bureau users will be prompted (when you log in for the first time) to change your password on the following screen:

Input your Old password first and then the New one. Create a password that is unique and not easy for others to guess. Avoid names of family members and try to use a combination of alpha and numeric. This is your secure access to the system, so treat it as you would a pin number.

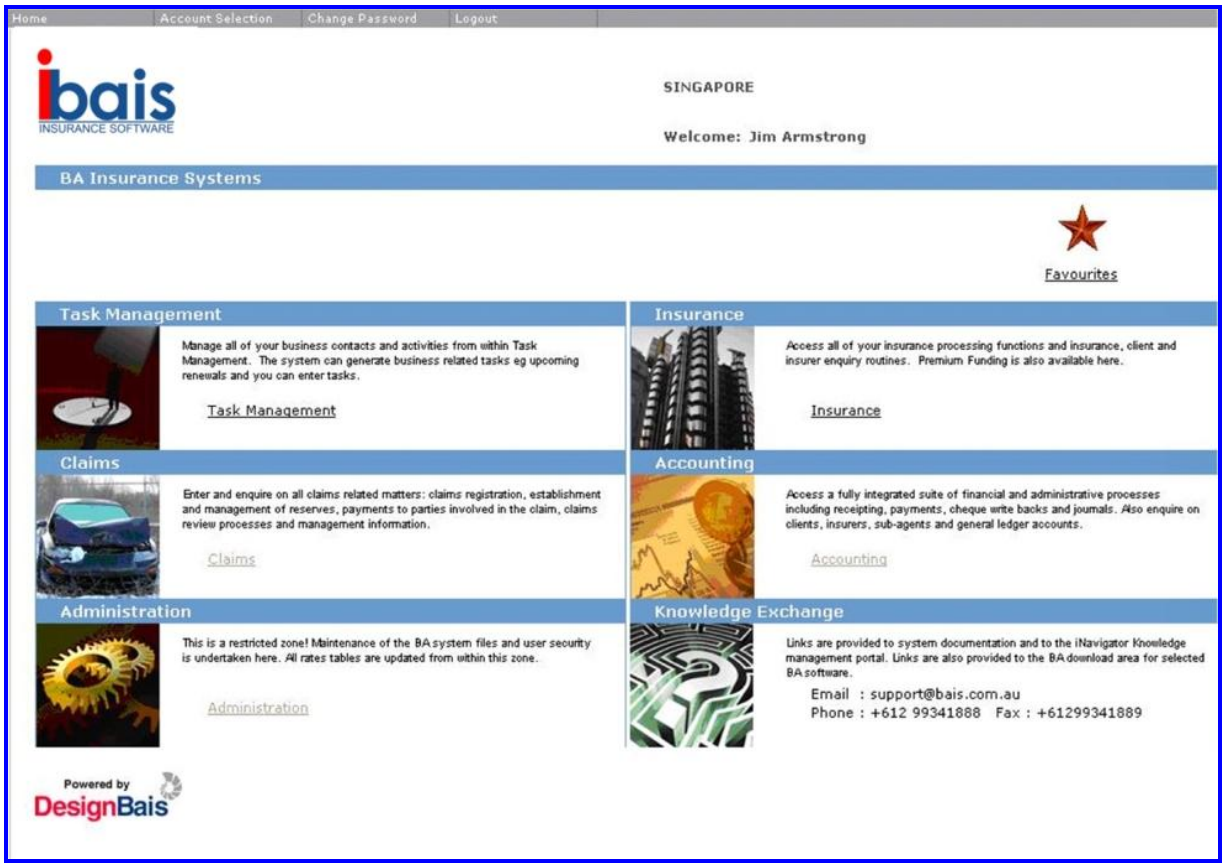
Click on the **Change Password** button to continue.

When the password is successfully changed the following screen is displayed:


Password changed
Your password has been changed. Please click here to enter the site.
Click here to continue into the web enquiry system.

Once you have successfully passed the security check, you will be presented with the first ibais form.

When this screen is displayed, you can use F11 to remove the unnecessary toolbars and make the system full screen. (Pressing F11 again reverses this, if required.)


Home
Account Selection
Change Password
Logout
ibais
INSURANCE SOFTWARE
SINGAPORE
Welcome: Jim Armstrong
BA Insurance Systems
Favourites
Task Management
Manage all of your business contacts and activities from within Task Management. The system can generate business related tasks eg upcoming renewals and you can enter tasks.
Task Management
Insurance
Access all of your insurance processing functions and insurance, client and insurer enquiry routines. Premium Funding is also available here.
Insurance
Claims
Enter and enquire on all claims related matters: claims registration, establishment and management of reserves, payments to parties involved in the claim, claims review processes and management information.
Claims
Accounting
Access a fully integrated suite of financial and administrative processes including receipting, payments, cheque write backs and journals. Also enquire on clients, insurers, sub-agents and general ledger accounts.
Accounting
Administration
This is a restricted zone! Maintenance of the BA system files and user security is undertaken here. All rates tables are updated from within this zone.
Administration
Knowledge Exchange
Links are provided to system documentation and to the iNavigator Knowledge management portal. Links are also provided to the BA download area for selected BA software.
Email : support@bais.com.au
Phone : +612 99341888 Fax : +61299341889
Powered by
DesignBais

How to Drive ibais

The system is driven through the ibais Home Page (shown above).

The page has a number of topic panels with links to the panel's relevant functions.

The ibais Security system only enables access to panels and functions that you are allowed.

There is also a

icon which lets you incorporate your most used functions in one place.

There are a number of navigation rules for the new system:

1. The **TAB key** replaces the Enter key.
   The TAB key submits the data to the browser for processing.

2. **Underlined words** are hyperlinks.
   Any underlined word can be clicked to activate a new function.

3. **Shaded boxes** in data on forms lets you drill down into the underlying data.

4. The at the top of the browser form dismisses the form.

5. Clicking on the

button closes the current form and does not save data entered on that form.

Tips

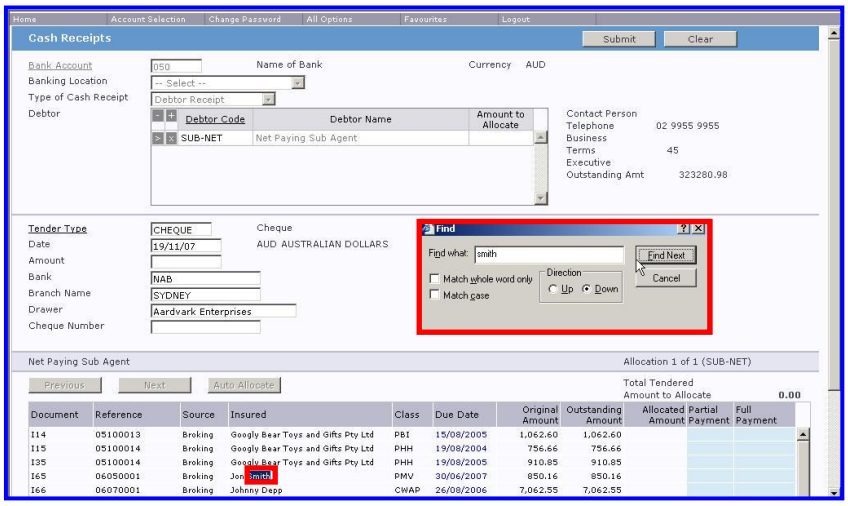
The ibais system allows you to open several sessions on the one computer with one licence. In the morning, when you first log in, use **Ctrl-N** to open an additional session which you can then navigate to with **Alt-Tab** if you need to enquire on something while processing.

F1 By pressing **F1** in any of the drop down menus or fields you can access a Help Screen. This prompts you for the information required in the drop down menu or field you are trying to input data.

F7 By pressing **F7** in any of the input fields you can spell check on the data input.
Pressing the "IGNORE" button will ignore a misspelled word for that particular spell check action. If you do the spell check on the same field, the spell checker will pick up that word even if it has been previously ignored. Pressing the "LEARN" button will learn a misspelled word as a new word but, only for your UserID. These words can be UN-LEARNED by clearing the browser's cookies.

Ctrl F On screens where you are searching through a listing of data (i.e. Items to allocate against in a cash receipt) you may use **Ctrl F** to search or find the required data as highlighted below.

F7 ibais spell check function cannot be manipulated by our users.



Short Cuts for Date Fields

In all date fields in ibais you can use the following shortcuts:

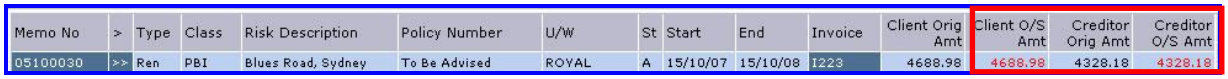
T Inserts today's date
-n Subtracts n days from today's date (e.g if today is the 15th inputting **-1** will insert 14th of the current month automatically
+n Adds n days to today's date (e.g if today is the 15th inputting **+1** will insert 16th of the current month automatically

Also It is not necessary to input the year if the date you are inputting is in the current year. If you input **15/6** or **15 6** the system will automatically insert **15/06/08** in the date field for you.

Colour Assistance

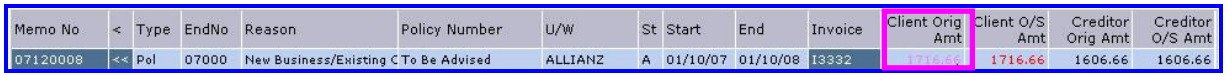
The ibais system allows for easy recognition of the status of transactions by providing a variety of colours to denote certain information.

Red on a dollar amount denotes an **overdue debt**.



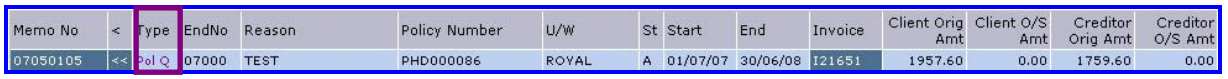
Memo No	>	Type	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
05100030	>>	Ren	PBI	Blues Road, Sydney	To Be Advised	ROYAL	A	15/10/07	15/10/08	I223	4688.98	4688.98	4328.18	4328.18

Pink on a dollar amount denotes that the **debtor is different to the insured** and that another debtor is responsible for payment (e.g. A third party broker/subagent)



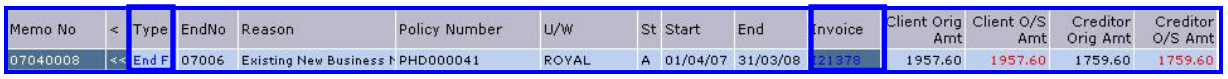
Memo No	<	Type	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07120008	<<	Pol	07000	New Business/Existing C	To Be Advised	ALLIANZ	A	01/10/07	01/10/08	I3332	1716.66	1716.66	1606.66	1606.66

Purple Transaction Type denotes a **Quoted Premium Funding loan**.



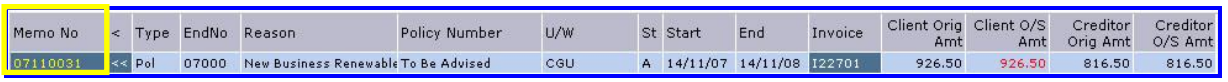
Memo No	<	Type	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07050105	<<	Pol Q	07000	TEST	PHD000086	ROYAL	A	01/07/07	30/06/08	I21651	1957.60	0.00	1759.60	0.00

Blue Transaction Type and Invoice Number denotes a **Converted Premium Funding loan**.



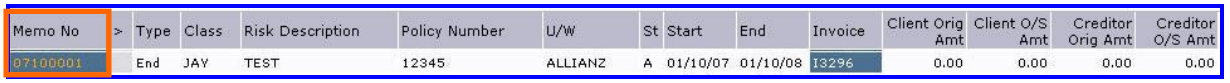
Memo No	<	Type	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07040008	<<	End F	07006	Existing New Business R	PHD000041	ROYAL	A	01/04/07	31/03/08	I21378	1957.60	1957.60	1759.60	1759.60

Yellow Memo Number denotes a **transaction Suspended in ibais**.



Memo No	<	Type	EndNo	Reason	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07110031	<<	Pol	07000	New Business Renewable	To Be Advised	CGU	A	14/11/07	14/11/08	I22701	926.50	926.50	816.50	816.50

Orange Memo Number denotes a **transaction Suspended in SBClient**.



Memo No	>	Type	Class	Risk Description	Policy Number	U/W	St	Start	End	Invoice	Client Orig Amt	Client O/S Amt	Creditor Orig Amt	Creditor O/S Amt
07100001		End	JAY	TEST	12345	ALLIANZ	A	01/10/07	01/10/08	I3296	0.00	0.00	0.00	0.00

Favourites

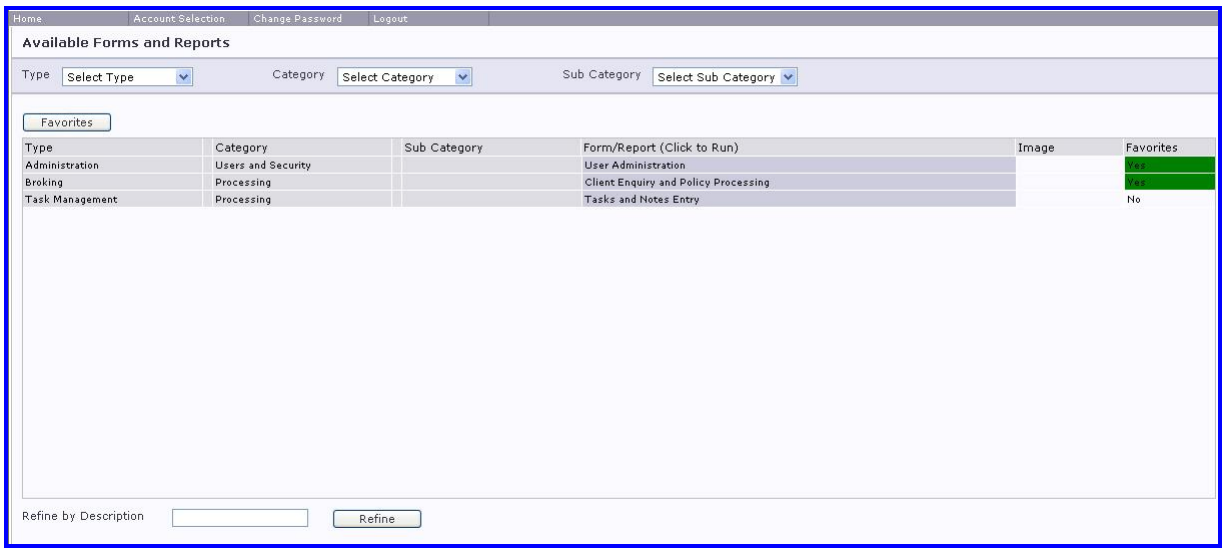
Favourites allow you to group together your most used functions into an easily accessible icon.

There are two modes in this form – **Display Favourites** and **Display All**.

The Display All / Favourites button, in "**Display All**" mode, shows all of the functions that the user is allowed to access.

Clicking on the **Yes/No** field enables or disables the function as a Favourite.

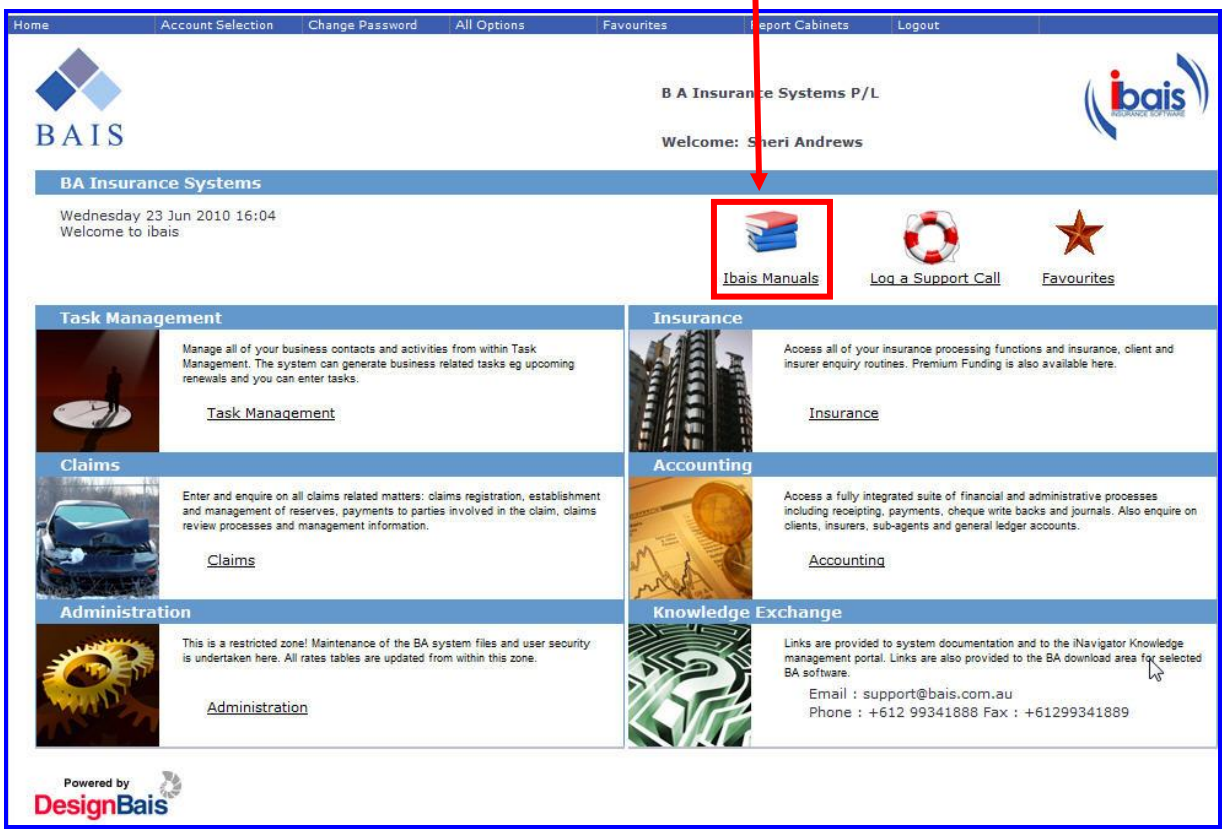
Type Category and **Sub Category** dropdowns allow you to select the items that appear on the Favourites report.



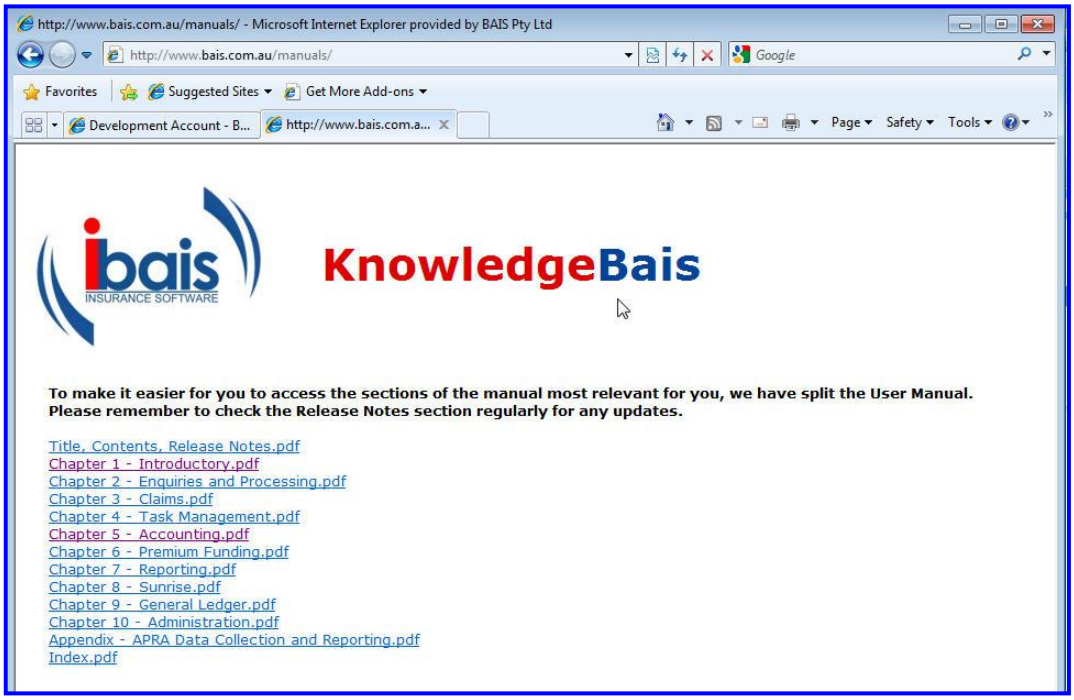
Getting Help

Accessing the Manual

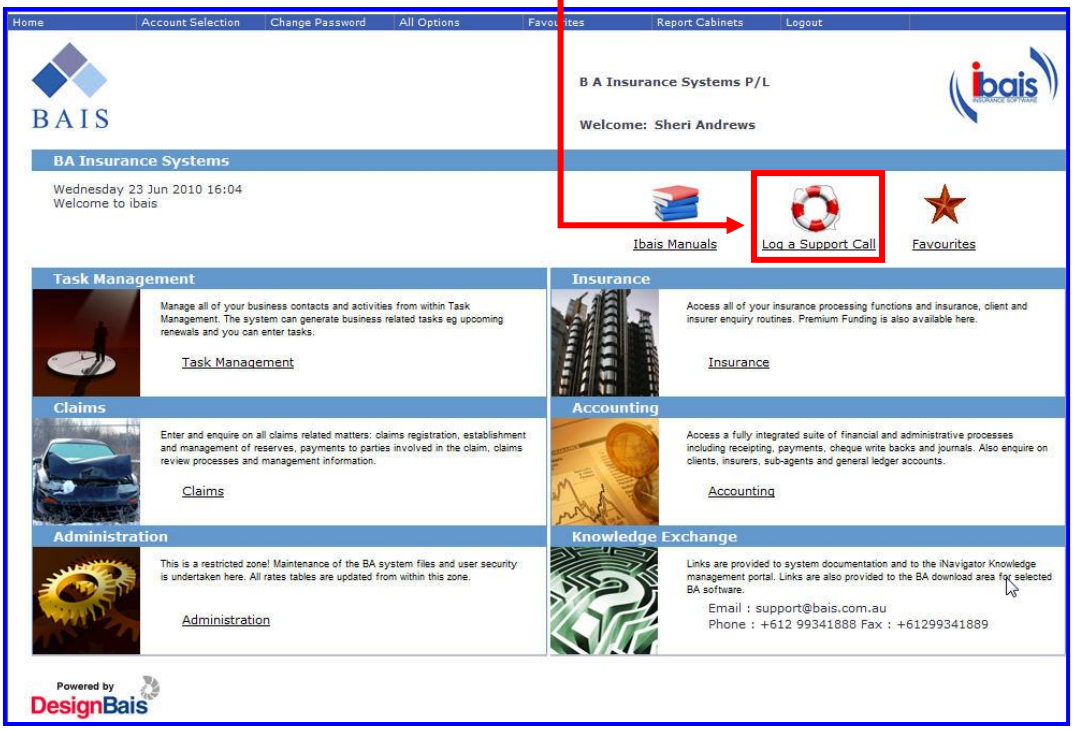
You can access the user manuals by clicking on the ibais Manuals icon or hyperlink on the Home screen as shown below:

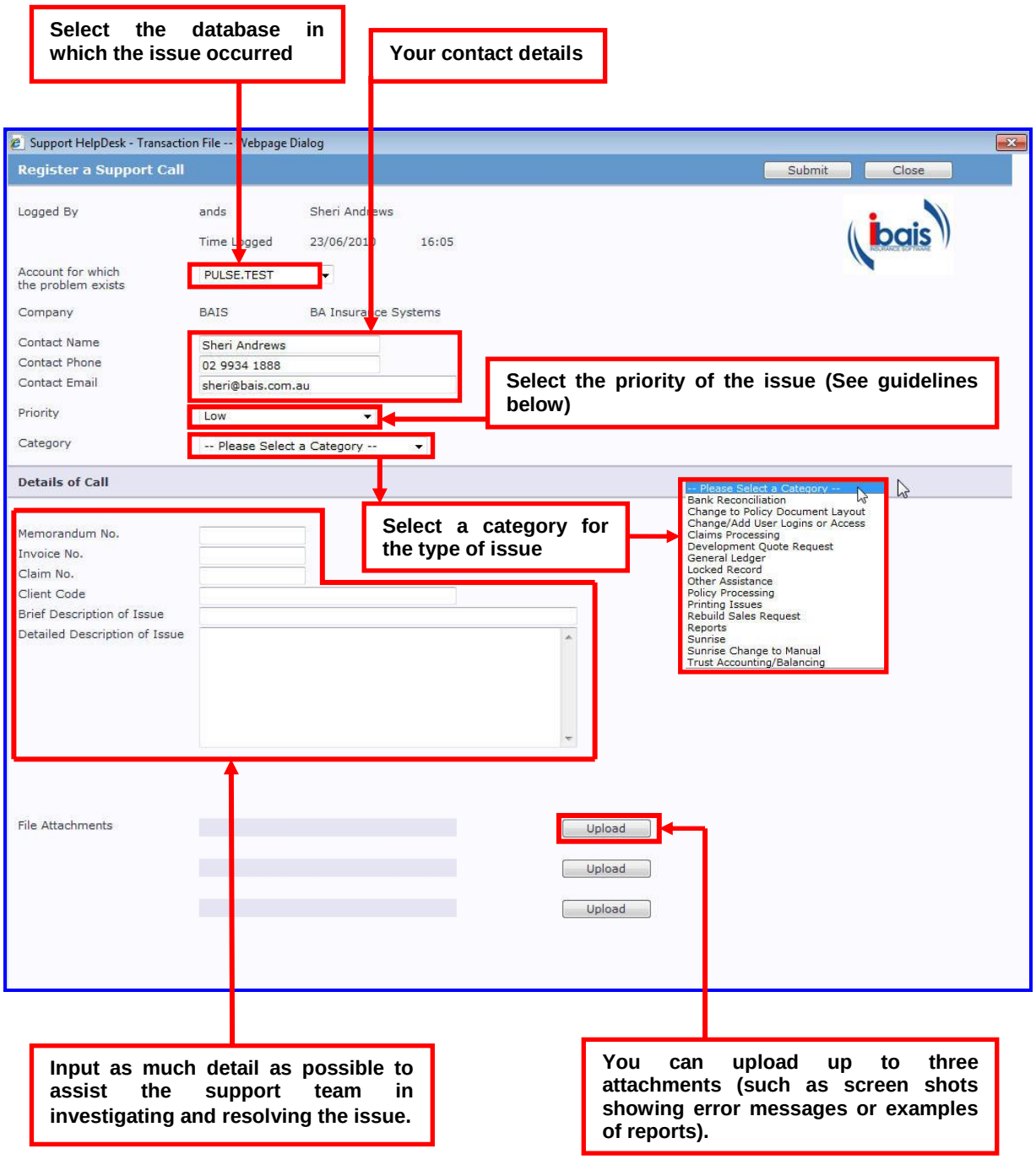

Home
Account Selection
Change Password
All Options
Favourites
Report Cabinets
Logout
BAIS
B A Insurance Systems P/L
Welcome: Sheri Andrews
ibais
BA Insurance Systems
Wednesday 23 Jun 2010 16:04
Welcome to ibais
Ibais Manuals
Log a Support Call
Favourites
Task Management
Manage all of your business contacts and activities from within Task Management. The system can generate business related tasks eg upcoming renewals and you can enter tasks.
Task Management
Insurance
Access all of your insurance processing functions and insurance, client and insurer enquiry routines. Premium Funding is also available here.
Insurance
Claims
Enter and enquire on all claims related matters: claims registration, establishment and management of reserves, payments to parties involved in the claim, claims review processes and management information.
Claims
Accounting
Access a fully integrated suite of financial and administrative processes including receipting, payments, cheque write backs and journals. Also enquire on clients, insurers, sub-agents and general ledger accounts.
Accounting
Administration
This is a restricted zone! Maintenance of the BA system files and user security is undertaken here. All rates tables are updated from within this zone.
Administration
Knowledge Exchange
Links are provided to system documentation and to the iNavigator Knowledge management portal. Links are also provided to the BA download area for selected BA software.
Email : support@bais.com.au
Phone : +612 99341888 Fax : +61299341889
Powered by
DesignBais

The **KnowledgeBais** screen is displayed as below and from there you can access any part of the manual as required by clicking on the relevant chapter to download the pdf.


http://www.bais.com.au/manuals/ - Microsoft Internet Explorer provided by BAIS Pty Ltd
http://www.bais.com.au/manuals/
Favorites
Suggested Sites
Get More Add-ons
Development Account - B...
http://www.bais.com.a...
Page
Safety
Tools
ibais
INSURANCE SOFTWARE
KnowledgeBais
To make it easier for you to access the sections of the manual most relevant for you, we have split the User Manual.
Please remember to check the Release Notes section regularly for any updates.
Title, Contents, Release Notes.pdf
Chapter 1 - Introductory.pdf
Chapter 2 - Enquiries and Processing.pdf
Chapter 3 - Claims.pdf
Chapter 4 - Task Management.pdf
Chapter 5 - Accounting.pdf
Chapter 6 - Premium Funding.pdf
Chapter 7 - Reporting.pdf
Chapter 8 - Sunrise.pdf
Chapter 9 - General Ledger.pdf
Chapter 10 - Administration.pdf
Appendix - APRA Data Collection and Reporting.pdf
Index.pdf

Logging a Support Call


Home
Account Selection
Change Password
All Options
Report Cabinets
Logout
BAIS
B A Insurance Systems P/L
Welcome: Sheri Andrews
BA Insurance Systems
Wednesday 23 Jun 2010 16:04
Welcome to ibais
Ibais Manuals
Log a Support Call
Favourites
Task Management
Manage all of your business contacts and activities from within Task Management. The system can generate business related tasks eg upcoming renewals and you can enter tasks.
Task Management
Insurance
Access all of your insurance processing functions and insurance, client and insurer enquiry routines. Premium Funding is also available here.
Insurance
Claims
Enter and enquire on all claims related matters: claims registration, establishment and management of reserves, payments to parties involved in the claim, claims review processes and management information.
Claims
Accounting
Access a fully integrated suite of financial and administrative processes including receipting, payments, cheque write backs and journals. Also enquire on clients, insurers, sub-agents and general ledger accounts.
Accounting
Administration
This is a restricted zone! Maintenance of the BA system files and user security is undertaken here. All rates tables are updated from within this zone.
Administration
Knowledge Exchange
Links are provided to system documentation and to the iNavigator Knowledge management portal. Links are also provided to the BA download area for selected BA software.
Email : support@bais.com.au
Phone : +612 99341888 Fax : +61299341889
Powered by
DesignBais


Select the database in which the issue occurred
Your contact details
Support HelpDesk - Transaction File -- Webpage Dialog
Register a Support Call
Submit
Close
Logged By
ands
Sheri Andrews
Time Logged
23/06/2010
16:05
Account for which the problem exists
PULSE.TEST
Company
BAIS
BA Insurance Systems
Contact Name
Sheri Andrews
Contact Phone
02 9934 1888
Contact Email
sheri@bais.com.au
Priority
Low
Category
-- Please Select a Category --
Select the priority of the issue (See guidelines below)
Details of Call
Memorandum No.
Invoice No.
Claim No.
Client Code
Brief Description of Issue
Detailed Description of Issue
Select a category for the type of issue
-- Please Select a Category --
Bank Reconciliation
Change to Policy Document Layout
Change/Add User Logins or Access
Claims Processing
Development Quote Request
General Ledger
Locked Record
Other Assistance
Policy Processing
Printing Issues
Rebuild Sales Request
Reports
Sunrise
Sunrise Change to Manual
Trust Accounting/Balancing
File Attachments
Upload
Upload
Upload
Input as much detail as possible to assist the support team in investigating and resolving the issue.
You can upload up to three attachments (such as screen shots showing error messages or examples of reports).

Guidelines for selecting the priority of a support call.

Critical: The entire system is unavailable or its use is severely restricted and there is no workaround. All users affected.

High: An essential component of the system is not working, or is not working correctly, or is working with limited functionality and there is ***no*** workaround. Most users or important business function affected.

Medium: An essential component of the system is not working, or is not working correctly, or is working with limited functionality and there ***is*** a workaround.

Low: A non-essential component of the system is not working correctly or only one or a small number of policies are affected. One or a small number of users affected.

Once your call is logged you will be sent an email acknowledgement with a support call reference number and a summary of the details you have submitted.